Executing Organizational Strategy -- A Literature Review and Research Agenda

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This article explores the barriers to successful implementation of organizational strategy. Drawing from the few key research works available, this article distills a list of core reasons for organizational strategy implementation failure and suggests several roles for Human Resource Development (HRD) professionals in addressing these barriers to strategy implementation. Implications for each role are discussed and conclusions and contributions to new knowledge in HRD are drawn.

Keywords: Strategy, execution, implementation

HRD professionals can play a critical role in the implementation of strategy as the execution of a new strategy has implications not only for the business systems within an organization, but also for its human systems. For example, Apple computer has re-energized its sales and reached a whole new clientele with the introduction of its iPod. This strategic option has required additional hardware, software and the expertise to bring it all together. Apple may have hired or trained its sales people, but the point is that executing this strategy has had significant implications for its *human* resources as well as its financial, marketing, sales and other resources. In this case we can see the role of human expertise as being critical to the strategy undertaken at Apple.

While occasionally we see organizations experience success with new strategies, most struggle. One need only look at the following statistics to determine that the barriers to executing strategy are becoming increasingly important to understand and avoid:

Beer & Eisenstat (2004) stated that 60 percent of strategy implementation failures are due to ineffective communication among executives, managers and line workers. "85% of management teams spend less than on hour a month on strategy issues and only 5 % of employees understand their corporate strategy -- 92% of organizations do not report on lead performance indicators" (Renaissance Solutions Survey, 1999, in J. Sterling, 2003). "Only 11% of companies employ a fully fledged strategic control system" (Goold, 2002). "Nearly 70% of all strategic plans and strategies are never successfully implemented" (Corboy & O'Corrbui, 1999). "The key to executing your strategy is to have people in your organization understand it" (Kaplan & Norton, 2000). Given these assertions, it seems that there exists a breakdown between the formulation of strategy and its implementation.

Communication, management style and alignment are common issues cited for implementation problems, but there is little evidence to support these claims and even fewer reports of rigorous research across multiple organizations that point to any specific and consistent reasons for organizational strategy implementation failure.

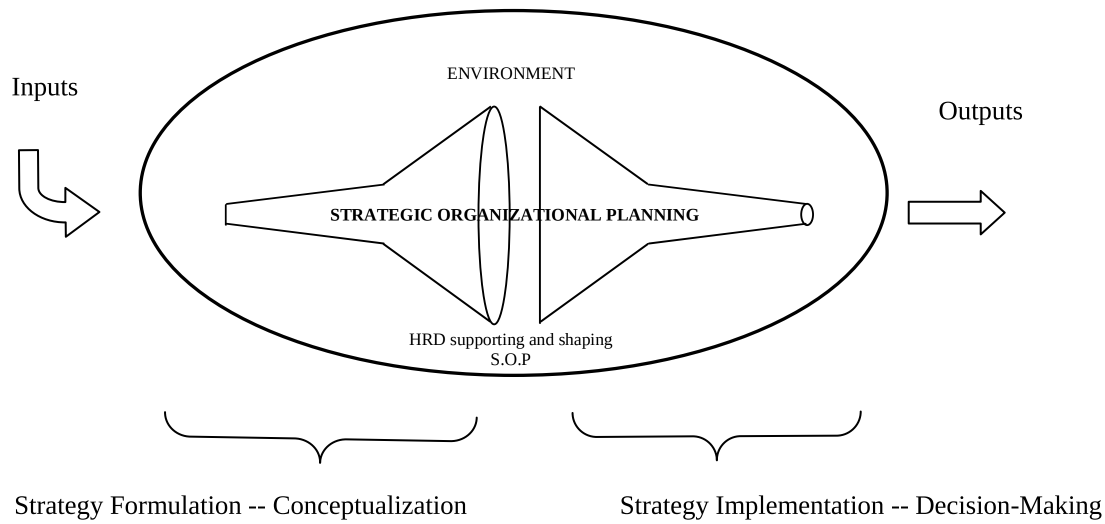
Rummler and Brache (1995) separated the strategy system into two components, (1) strategy formulation, and (2) strategy implementation. Based on Swanson, Lynham, Ruona, & Provo (1998) such a system can be depicted as in Figure 1.

In considering this system, it seems clear that HRD has contributions to make. Torraco and Swanson (1995) stated: "HRD will only be perceived as having strategic value if it also demonstrates genuine strategic capability" (p. 18). Torraco and Swanson (1995) further stated that there are two ways for HRD to demonstrate its strategic capability. They are (1) through educating organizational leaders about strategic thinking and (2) through direct participation in organizational planning. While some authors have advocated for HRD's participation in strategy *formulation*, (Provo, Lynham, Ruona & Miller, 1998; Swanson, 1999) Rummler and Brache (1995) have further suggested that HRD professionals have a role in strategy *implementation*. Therefore, two ways that HRD professionals might demonstrate strategic capabilities in this domain include (1) through educating organizational leaders about implementation processes and (2) direct participation in strategy implementation itself.

We can also consider the fact that in today's economy, individual knowledge and expertise are things that can provide an edge. For example, in the Apple computer example, human expertise has contributed to the competitive advantage of the firm.

Considering the scope of the literature available regarding strategy, it is surprising to find so little that deals explicitly with execution. Well-known authors such as Porter, Minztberg, Ansoff, and other classic strategy authors have a specific focus on the development of strategy. In fact, most of the strategy literature is focused on the articulation and development of strategy. Thus, little has been done to examine the execution of a given strategy, the reasons why strategy execution commonly fails, and under what conditions. There are a few studies that are of importance and it is clear that this is an emerging area of research that will likely be receiving much attention in the coming years. Kaplan and Norton (2001) have found strategy execution to be an area lacking in sound research and it seems that they plan to continue focusing their efforts on strategy execution in the future.

Figure 1. The Strategy System (based on Rummler & Brache, 1995 and Swanson, Lynham, Ruona & Provo, 1998).



Research Questions

The core problem to be addressed by this preliminary line of inquiry is that companies are increasingly experiencing difficulties in implementing strategy. In addition, a review of the strategy literature reveals an obvious gap in that there are numerous documented approaches to developing strategy, but relatively few that focus on translating an articulated strategy into action. Thus, the research questions that formed the basis of this inquiry were:

1) What are the barriers to successful strategy implementation in organizations?
2) What is the potential role of HRD in addressing those barriers?

Methodology

A literature review, analysis, and synthesis accomplished the purposes of this study. The method used to inform the literature search involved accessing scholarly literature available through electronic databases, including ABI Inform, ERIC, PsychInfo, as well as electronic journals Interscience/Wiley, Catchword, ScienceDirect, and JSTOR. Each search used keywords and phrases: “strategy failure”, “failure”, “failure in organizations”, “implementation failure”, “strategy implementation failure”, “strategy problems”, “problems with implementing strategy”, and “strategy issues”. These searches, conducted through several large search engines at a major university in the Untied States, yielded a total of fifty-four resources. These articles were then screened according to relevance for the purposes of this study. Only articles with explicit reference to strategy failure were considered. For example, editorials and sources that alluded to other topics (such as market failure) were excluded from the final resource pool of five articles. The articles that resulted from these screenings were examined in detail and given the small number of relevant articles, each was reviewed in some detail as the basis of this literature review.

Limitations

A limitation of this review is acknowledged as the study is based on research that examines the notion of executing strategy labeled as such. It is certainly plausible that some specific aspects of implementing organizational strategy were not recognized by the electronic searches conducted for this study. For example, it is certainly possible that an organization may conduct reengineering as part of its overall strategy. Any research detailing the success or failure of reengineering would not have been uncovered given the search protocol for this study.

A further limitation is recognized in that a wide range of literature regarding organizational change has not been incorporated into this article. Given the intent of presenting key works that detail instances of overall organizational strategy failure, or key barriers to success, this article has not incorporated the general organizational change literature. It is certain that these two bodies of knowledge are related and while the overlap of these areas should be examined in future studies, it is beyond the scope of this article to do so.

A final additional limitation of this study is in the few number of articles that were uncovered. The intent of this research was to find articles that explicitly state barriers to executing strategy in organizations. The sources that were revealed were questionably few, thus, the validity of this study is certainly questionable. This few number of articles is also indicative of an area that is lacking attention in the scholarly realm. To be sure, implementation and execution are emerging areas of close and careful study that, we believe, warrant the attention of HRD scholars and practitioners.

Research Detail and Discussion

The majority of this article outlines the key research studies that have significant contributions to make to the understanding of strategy implementation, or execution failure. Each study is outlined and discussed, including key findings, and implications for executing strategy in a more effective way. The intent of outlining these studies is to determine the necessary and sufficient conditions for implementing strategy successfully that are supported by research, and to determine where more rigorous research must be conducted.

Sterling

The research conducted by Sterling (2003) indicates several key reasons that strategies fail. He interviewed CEO's of companies of varying size. His interviews revealed the following key reasons that strategies fail:

Unanticipated market changes. Often related to advances in technology, the fact that markets change (and can change suddenly) is commonly overlooked in the strategy implementation process.

Effective competitor responses. Sterling cited Kmart's cost reduction and price reduction strategy and the effective responses from Wal-Mart as a prime example of this phenomenon.

Issues related to timeliness and distinctiveness. Sometimes competitors can simply execute the same strategy at a faster rate. Sterling cites Sears as an example of a company that has been beaten to market repeatedly and also as a company that has lost its distinctiveness. Sterling suggested that there are three key steps to avoiding this reason for failure, namely, 1) understand the company's strengths, 2) understand what market positions are unoccupied, and 3) focus the company's strategies on using its strengths to capture those unoccupied positions.

Lack of focus. Simply described as a situation in which resources are randomly assigned and priorities are not clearly articulated, Sterling (2003) suggested that communicating the strategy in a paragraph once it is developed, and then prioritizing the top five to ten projects that will contribute to the realization of that strategy provides focus and clarity for multiple levels within the organization.

Poorly conceived business models. Sterling used the example of the telecom industry to illustrate the notion of poorly developed business models. Many telecom companies based their strategies on business models with a fundamental misunderstanding about how a specific demand would be met in the market (incumbent local exchange carriers).

Poor alignment of organization design and capabilities with strategy. Described as "unrecognized incompetence", Sterling makes the point that an organization must have the resources, capabilities, competence and priorities to do what it says is a priority.

Lack of manager involvement. The key suggestion provided here is that by involving managers in the *development* of strategy, executives can expect more support, excitement and commitment to the *execution* of strategy.

Poor communication among multiple levels in the organization. According to Sterling and an interview conducted with the CEO of Norlight Telecommunications, persistent and clear communication about the execution of strategy and its progress can help to ensure buy-in, understanding and support for the strategy throughout the organization.

Lack of monitoring progress toward meeting goals. According to a recent survey by The Institute if Management Accounting fifty percent of its members believe their performance measures are less than adequate in communicating their strategy to their employees.

Freedman

Freedman (2003) listed the following implementation pitfalls also based on interviews with CEOs from varying companies of ranging size:

Lack of strategic inertia. Many executives simply fail to put a priority on strategy.

Lack of stakeholder commitment. This is described as "particularly true of middle management who are frequently the block to progress" (p. 26).

Strategic drift (lack of focus -- unclear goals). "This can often start with a CEO if he or she ignores implementation. Without iron discipline throughout the organization, drift will occur" (p. 26).

Strategic "dilution". No one is taking ownership or providing commitment to strategy. "If ownership and commitment to the corporate strategy are not watertight in the top team, when team members return to their operations, divisional, functional, or geographic priorities are all too likely to take precedence" (p. 27).

Strategic isolation (lack of alignment among business units and goals). Strategic isolation occurs when communication is ineffective and business units, performance systems and process reflect varying and inconsistent goals.

Failure to understand progress (no measurement of indicators of success or failure). "Without continuous measurement of a strategy's "vital signs", both qualitative and quantitative key indicators of strategic success, the destination proves illusive" (p. 27)

Initiative fatigue (too many initiatives -- tired of consultants and their tricks). Managers who are used to seeing consultants come and go while little actually changes in the organization develop initiative fatigue. This also occurs when the organization is simply overloaded with varying projects.

Impatience (a demand that change happens now). Executives often have an emotional response to the time delay required to see real change implemented and it is usually an impatient and uncomfortable one.

Not celebrating success. "Failing to recognize and reward progress can hold back the achievement of the ultimate goal" (p. 27).

As a synthesis of the pitfalls and a general model for avoiding them, Freedman provides discussion of an entire strategy development and implementation model. Freedman ultimately suggested the following keys to successful strategy implementation:

1) Communicate the strategy
2) Drive and prioritize planning
3) Align the organization
4) Reduce complexity
5) Install an issue resolution system

Kaplan and Norton

Kaplan and Norton have created several systems and an extensive body of work that links to strategy, beginning with the "Balanced Scorecard". Their work evolved and became ever more related to strategy as they saw the problems and opportunities created by most authors leaving out the importance and implications of the strategy implementation process. As a part of their comprehensive "Strategy-focused organization", Kaplan & Norton (2001) provided the following set of best practices and their sub-components for implementing and executing strategy in organizations:

1) Mobilize change through effective leadership
2) Translate the strategy to operational terms
3) Align the organization to the strategy
4) Motivate to make strategy everyone's job
5) Govern to make strategy a continual process

In an attempt to simplify quite a complex model, Kaplan and Norton provided 5 key areas that need to be addressed to support successful strategy execution. Kaplan and Norton (2001) offered the following four processes for managing strategy:

1) Translating the vision
2) Communicating and linking
3) Business planning
4) Feedback and learning
5) Leadership

De Lisi

De Lisi (2002) offered the following reasons for the failure of strategy based on his own research conducted over two years of engagement with an executive team from a single client and seventeen years of strategy consulting. He did not, however, offer a detailed description of his sample or how he gained access to it.

Lack of knowledge of strategy and the strategy process. DeLisi stated that one key reason for strategy implementation failure is simply that very few executives come from a strategy background or spend any time in the strategy function before becoming executives.

No commitment to the plan. DeLisi stated that lower-level and middle managers are often uncommitted to the plan because they had nothing to do with its creation, and thus, there is no "buy-in".

The plan was not communicated effectively. Typically, executives allow forty-two percent of their managers and twenty-seven percent of their employees access to the plan itself. In the instances when the plan is, in fact communicated, the plan is so unclear that managers and employees struggle to follow it.

People are not measured or rewarded for executing the plan. Less that 60% of companies that the author had worked with tied employee incentive compensation to the achievement of strategic plans or sub-goals derived from it.

The plan is too abstract; people can't relate it to their work. "The plan is not translated into the short-term actions that individual employees need to take" (DeLisi, 2004, p. 4). Further, the plan is not articulate or clear enough to be translated into process or work level goals and priorities.

People are not held accountable for execution. With accountability, people should be held responsible for portions of the plan and for the predetermined results from the plan. Rewards and / or punishments should be administered according to the realization or non-realization of results (DeLisi, 2004)

Senior management does not pay attention to the plan. "We see this in cases where once the strategic plan has been created, senior management attention reverts to day-by-day business as usual" (DeLisi, 2004, p. 4)

Strategy is not clear, focused and consistent. People cannot understand the priorities, or the clear intent of the organization based on plans that are inconsistent and unfocused.

Conditions change that make the plan obsolete. Efforts are not made to keep the strategy alive and updated. This problem is also the result of short-term views of strategy and the strategy making / implementation phenomenon (DeLisi, 2004).

The proper control systems are not in place to measure and track the execution of the strategy. The organization must have some kind of system in place to ensure that it is learning from the strategy process. Viewing strategy as an ongoing process is the first step toward realizing an organizational learning system.

Reinforcers, such as, culture, structure, processes, IT systems, management systems and human resource systems are not considered, and/or act as inhibitors. These systems must align with the proposed strategy and support the goals and priorities that are articulated within it. Successful execution rests on the ability of the sub-systems in the organization to carry out the mission and achieve the goals described in the strategy.

People are driven by short-term results. An overemphasis on day-by-day activities promotes the notion that strategy is a completely tactical exercise (DeLisi, 2004).

Beer and Eisenstat

Beer & Eisenstat (2000) reported that the six key "strategy killers" are:

Top-down or laissez-faire senior management style. Frequently cited characteristics of this style of management include a discomfort with conflict, absences, and the use of a top team for administrative functions rather than strategic discussions and dialogue (Beer & Eisenstat, 2000).

Unclear strategies and conflicting priorities. "Conflicting strategies and priorities that battle each other for the same resources produce a rapid failure for both perspectives" (Beer & Eisenstat, 2000, p. 32).

Ineffective senior management team. Team members who operate and prioritize within their own "silos" rather than coordinate with other team members and departments quickly kill the collaborative perspective that is required for successful strategy implementation (Beer & Eisenstat, 2000).

Poor vertical communication. Employees often feared that senior level mangers and executives did not want to hear their observations or interpretations of the problems they were facing.

Poor coordination across boundaries. This strategy killer is often a result of killer number two: unclear strategies and conflicting priorities, but can also occur independent of the strategies and priorities that are set.

Inadequate down the line leadership skills. Lower-level managers were not developing skills through the new opportunities they were facing, "nor were they supported through leadership coaching or training" (Beer & Eisenstat, 2000, p. 32).

Findings

The models of strategy implementation failure are summarized and compared with the other models in Table 1. Table 1 includes the highlights from the literature searches related to strategy failure and color-coding, italics and numbers have been used to denote the same elements as they appear across multiple models.

Table 1. Matrix of Strategy Implementation Failure Models

Failure Reason	Sterling	Freedman	Kaplan & Norton	DeLisi	Beer & Eisenstat
1) External issues (market changes, effective competitor responses)	*Unanticipated market changes (1)* *Effective competitor responses (1)*			*Conditions change that make the plan obsolete (1)*	
2) Lack of focus (unclear goals that don't translate to other organization levels)	*Lack of focus (inarticulate goals that don't translate to process and individual levels) (2)*	*Strategic drift (lack of focus -- unclear goals) (2)*	*Failure to translate the strategy to operational terms (2)*	*The plan is too abstract; people can't relate it to their work (2)* *Strategy is not clear, focused and consistent (2)*	*Unclear strategies and conflicting priorities (2)*
3) Misalignment among business processes, units and their goals	*Poor alignment of organization design and capabilities with strategy (3)* *Poor communication among multiple levels in the organization (5)*	*Strategic isolation (lack of alignment among business units and goals) (3)*	*Failure to align the organization to the strategy (3)*	*Reinforcers, such as, culture, structure, processes, IT systems, management systems and human resource systems are not considered, and/or act as inhibitors (3)* *The plan was not communicated effectively (3)*	*Poor vertical communication (3)* *Poor coordination across boundaries (3)*
4) Failure to measure progress and hold people accountable	*Lack of monitoring progress toward meeting goals (4)*	*Not celebrating success (failing to recognize and reward progress) (4)* *Failure to understand progress (no measurement of indicators of success or failure) (4)*	*Failure to make strategy everyone's job (4)*	*People are not measured or rewarded for executing the plan (4)* *People are not held accountable for execution (4)*	
5) Problems with leadership and commitment to the strategy	*Poor succession planning (5)* *Lack of manager involvement (5)*	*Lack of strategic inertia (many executives fail to put a priority on strategy) (5)* *Lack of stakeholder commitment (5)* *Strategic "dilution" (no one is taking ownership or providing commitment to strategy) (5)*	*Ineffective leadership (5)*	*Senior management does not pay attention to the plan (5)* *No commitment to the plan (5)*	*Ineffective senior management team (5)* *Top-down or laissez-faire senior management style (5)* *Inadequate down the line leadership skills (5)*
Misc	*Issues related to timeliness and distinctiveness* *Poorly conceived business models*	*Initiative fatigue (too many initiatives -- tired of consultants and their tricks)* *Impatience (a demand that change happens now)*	*Strategy is viewed as a single, short-term process*	*Lack of knowledge of strategy and the strategy process* *The proper control systems are not in place to measure and track the execution of the strategy* *People are driven by short-term results*	

As an attempt at synthesizing the key reasons for strategy implementation failure cited in the research available, the elements shared in all of the models and supported by the general literature review are:

1) External issues (market changes, effective competitor responses)
2) Lack of focus (unclear goals that don't translate to other organization levels)
3) Misalignment among business processes, units and their goals
4) Failure to measure progress and hold people accountable
5) Problems with leadership and commitment to the strategy

Conclusions

HRD has a potential role to play to address each of these key reasons for strategy implementation failure. The remaining sections of this article will outline those potential roles and then draw conclusions and recommendations for HRD practice.

The Role of HRD in Addressing External Issues

HRD has no apparent and explicit role in most organizations that relates to market changes or competitor actions. In fact, these external issues are often surprises that are beyond the scope of organizational or departmental control. There are, however, specific tools aimed at stretching thinking within the organization at the macro level about what external changes could come to be. Scenario planning, for example, is one method of examining external potential and plausible futures, but to date, HRD has had little role in facilitating scenario planning processes within organizations. Authors have argued for the further strategic roles that HRD might play (Torraco and Swanson, 1995), and engaging in strategy formulation is one way that HRD professionals can work toward addressing external issues.

The Role of HRD in Providing Focus

The role of HRD professionals as facilitators varies across organizations. Some organizations incorporate HRD functions into the strategic agenda and some do not. What seems certain is that qualified HRD professionals are familiar with the importance of clear organizational goals and how they translate to the other levels of the organization. Organizational focus is also a result of the mission, vision and approach to engagement that is prevalent throughout the organization. HRD must work to establish its role as that of a valued contributor in the organization before its practitioners can influence the workings at the executive level. The role of HRD in providing focus is clearly influenced and related to its role in alignment.

The Role of HRD in Establishing Alignment

Semler's (2000) work on alignment speaks directly to this critical role for HRD professionals. Rummler and Brache's (1995) work relating to levels in the organization also speaks directly to the issue of alignment. In short, these authors have argued for goal alignment beginning with the strategic goals of the organization. Process goals must support those organization goals, and individual goals must support process goals. Dissention among these goals has been shown to foster a lack of focus and decreased performance (citation).

The Role of HRD in Measuring Progress and Monitoring Accountability

Part of Swanson's (1995; 1999) tireless argument for HRD to focus on performance has been specifically to address issues related to measuring progress and monitor accountability. Organizations that do not track the effects of interventions are left unable to answer questions about their overall progress and effectiveness, and cannot legitimately hold individuals accountable. Moving forward, HRD professionals must work to ensure that *all* of the interventions that they are involved in culminate in some form of evaluative effort, and as this literature indicates, especially with regard to any strategy related efforts. Further, the notion of accountability begins with top leadership modeling the expectations within the organization.

The Role of HRD in Leadership and Commitment

While HRD scholars have contributed to some of the literature concerning leadership in organizations, research that provides measurable results in this domain has not been made available. Clearly, there is an obvious role for HRD professionals to play that can instill or provide an example of leadership and commitment to the implementation of strategy. This article began with the use of an example from Apple computer, and the argument that strategy implementation has tremendous implications for on organization's human resources. What HRD and HRM professionals *do* to get involved in strategy implementation and how such professionals carry out their part of the implementation is critical to the demonstration of leadership and commitment. This role also includes the importance of leadership development, coaching and selection -- all of which are clearly within the expertise domain of HRD professionals.

Contributions to New Knowledge in HRD

The fact that strategy implementation and execution has gone largely unexplored by researchers and practitioners provides opportunities for HRD professionals (be they academics or practitioners or both). Three core opportunities that are revealed immediately are these: 1) a chance for HRD professionals to become involved in an aspect of strategy that has gone unchecked, 2) a research agenda that can provide leverage for HRD professionals to position themselves as contributors to strategy, and 3) a means for HRD professionals to link up with researchers and practitioners from alternate disciplines.

Further, the issue of strategy implementation is one that is vital to the success of organizations. This article has outlined five roles for HRD that may help to address problems with strategy implementation failure. While the role and importance of HRD may vary from organization to organization, it seems that the more effectively HRD professionals can perform, the more likely it is that they will be included in strategic organizational processes.

In addition to uncovering the key barriers to successful strategy implementation, this research has provided an opportunity for HRD professionals to more closely associate themselves with strategy literature and research. In this case the implementation refers to *how* the strategy is carried out in organizations, and if this is not done through human resources, then how is it done at all? Thus, we argue that human resources are THE crucial resource in executing organizational strategy.

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